



## CASE STUDY: International Bond Manager

### Background & Objectives

The client is an emerging international bond manager investing in sovereign and corporate bonds with an emphasis on quantitative risk control.

Initial support had been received from significant institutional investors; however institutional investment consultants were more challenging in terms of moving from general interest to formal ratings and support.

The objectives of the review included:

- ▶ Greater clarity around investment philosophy, investment process and comparative advantage
- ▶ Improved market positioning and differentiation
- ▶ Better information regarding the institutional investment consulting market and the path to a successful rating
- ▶ Feedback on sales materials and style (FSC questionnaire, website, pitch book)

### Financial Viewpoint Credentials

Over a decade of investment consulting experience

More than 1,000 manager meetings

Up-to-date knowledge of investment consultants

Honest feedback

Strategic, communication, investment and operational skills

### “ Testimonials

The team at Financial Viewpoint are seasoned investment professionals who are able to present feedback and communicate the benefits effectively. They have played a key role in the development and implementation of our very successful institutional business strategy and will provide valuable experience and knowledge to any commercial investment partnership.

- Chief Executive Officer

Financial Viewpoint's workshop was invaluable; we obtained honest feedback from experienced industry practitioners. Their recommendations provided us with a robust framework to work to, and as a direct result we have improved our corporate messaging, communication materials and have completely overhauled our website. The changes we have implemented yielded results almost immediately and all involved (even the most sceptical participants) agreed it had been a very worthwhile process.

- Manager, Institutional Sales

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### Review Simulation

#### 1. Review background information

All information typically provided to an investment consultant prior to a formal review meeting was analysed (FSC questionnaire, pitch material, corporate information). Other public material (e.g. website) was also examined.

#### 2. Simulated review

A 2 hour meeting was held to simulate a first meeting with an institutional investment consultant. The focus was on detailed questioning of the investment philosophy, investment process and the business more generally to identify points of differentiation and comparative advantage.

#### 3. Comprehensive, honest feedback

A comprehensive debriefing followed the review with a focus on key impressions, areas of strength and points requiring refinement. Feedback and advice was provided on business and product positioning, investment philosophy and process, presentation style and all materials.